

**2011 St. John's Time  
Survey Results**

**July 28<sup>th</sup> – August 7<sup>th</sup>, 2011**

Department of Economic  
Development, Tourism & Culture  
City of St. John's

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## **Preface**

### **Background**

The City of St. John's hosts a number of festivals and events throughout the year. Four of these festivals and events are held annually from the last week of July to the first week of August. Since all four festivals and events occur within a two week time period, the City of St. John's and the four festival organizing committees agreed to work in cooperation to market all four events together under an umbrella festival. The umbrella festival came to fruition in 2006 and was branded and marketed as the "*St. John's Time*".

The four festivals/events include:

1. George Street Festival (Thursday July 28<sup>th</sup> to Tuesday August 2<sup>nd</sup>);
2. Royal St. John's Regatta (Wednesday August 3<sup>rd</sup>);
3. Newfoundland and Labrador Folk Festival (Friday August 5<sup>th</sup> to Sunday August 7<sup>th</sup>)
4. Busker Festival (Friday August 5<sup>th</sup> to Sunday August 7<sup>th</sup>).

### **Purpose**

The purpose of this study is to determine the following:

1. Origins of festival patrons.
2. Purpose of visit to St. John's and length of stay.
3. To determine if the festival drew visitors to St. John's.
4. How many of the four individual festivals patrons attended.
5. Expenditures per person by festival.
6. Percentage of repeat festival visitors.
7. Festival awareness.
8. Demographics.

## Survey Methodology

1,301 parties were surveyed at the four St. John's Time festivals. The personal interviews were conducted onsite during each festival.

520 surveys were administered at the George Street Festival followed by 310 surveys at the Royal St. John's Regatta, 305 at the Newfoundland and Labrador Folk Festival and 166 surveys at the Busker Festival.

Caution should be used when interpreting some of the data because the surveys for both the George Street Festival and the Folk Festival were conducted prior to 9:15 pm. As a result, patrons arriving at both festivals after 9:15 pm were not included in the survey. Demographics and expenditure patterns of these later arriving patrons may differ from the earlier arriving patrons that were included in this survey.

Caution should also be used with the data regarding patron attendance levels at the other St. John's Time festivals because the data includes some measurement of intention to attend a future festival rather than the actual attendance level at another festival. For example, since the George Street Festival was surveyed first, patrons surveyed at this festival were asked "Which of the following St. John's Time festivals do you expect to attend?" In this instance, the survey methodology measures the intention to attend a future festival and not the actual percentage that attended one of the other St. John's Time festivals. Therefore, the data regarding patron attendance levels at one of the other three festivals may actually be under or over reported.

In addition, please note that due to inclement weather both the Folk Festival and Busker Festivals were moved to inside venues on both Saturday August 6<sup>th</sup> and Sunday August 7<sup>th</sup>. The Folk Festival was moved inside to Mile One Centre for both Saturday August 6<sup>th</sup> and Sunday August 7<sup>th</sup>. Meanwhile, the Busker Festival was moved inside St. John's City Hall on Saturday August 6<sup>th</sup> and inside Scotia Centre on Sunday August 7<sup>th</sup>.

This report represents a summary of the results. Please direct inquiries to Department of Economic Development, Tourism & Culture, City of St. John's, P.O. Box 908, St. John's, Newfoundland A1C 5M2, (709) 576-8548, e-mail: [tlehr@stjohns.ca](mailto:tlehr@stjohns.ca).

### Highlights

- The majority of St. John's Time patrons were from the St. John's CMA (65%) while 28% were out of province visitors and the remaining 7% were from other regions of Newfoundland and Labrador. Overall, 50% of St. John's Time patrons surveyed resided outside the City of St. John's municipal boundary.
- The average length of stay in St. John's for those visiting from outside the St. John's CMA was 8.65 nights. Out of province visitors had a longer length of stay (9.29 nights) than residents from other regions of Newfoundland and Labrador (5.26 nights).
- Almost one in four (36%) visitors indicated that their major reason for visiting St. John's was for vacation purposes. Another 32% indicated they visited St. John's to spend time with friends and relatives.
- The study determined that both the George Street and Newfoundland and Labrador Folk Festivals are travel generators for St. John's. Overall, 18.2% of out of province visitors reported the major reason for their visit to St. John's was to attend the George Street Festival (16.5%) or St. John's Time (1.7%). Meanwhile, 12.2% of out of province visitors reported the major reason for their visit to St. John's was to attend the Newfoundland and Labrador Folk Festival (10.8%) or St. John's Time (1.4%).
- Six in ten (59%) St. John's Time Festival attendees attended the festival with a group of family and/or friends.
- Seven in ten (69%) festival patrons were repeat festival attendees. CMA residents (86%) were more likely to have had visited in a previous year.
- The Busker Festival (31%) attracted a greater share of first time or new St. John's CMA customers than did the George Street Festival (17%), the Folk Festival (12%) and Royal St. John's Regatta (5%).
- Two out of three (67%) festival patrons surveyed attended at least one of the other St. John's Time events. The average number of St. John's Time festivals attended was 2.05.
- George Street Festival patrons spent an average of \$70.65 at the festival, compared to \$23.71 spent by Folk Festival patrons, \$20.23 by Royal St. John's Regatta patrons and \$15.20 by Busker Festival patrons.
- The average length of time spent at the Royal St. John's Regatta was two hours and 53 minutes.

- The average number of nights that George Street Festival patrons attended over the six-night festival was 2.02.
- The average number of sessions that Folk Festival patrons attended over the three-day festival was 2.87 (out of a possible 5).
- The average number of performances that Busker Festival patrons attended per day was 2.89.
- The average number of days that Busker Festival patrons attended over the three-day festival was 1.32.
- One in five festival patrons (19%) have heard of the St. John's Time Festival.
- Six in ten St. John's Time patrons (59%) reported their age as 30 years or older. Both the Royal St. John's Regatta and Busker Festival attracted a younger clientele than both the George Street and Folk Festivals.

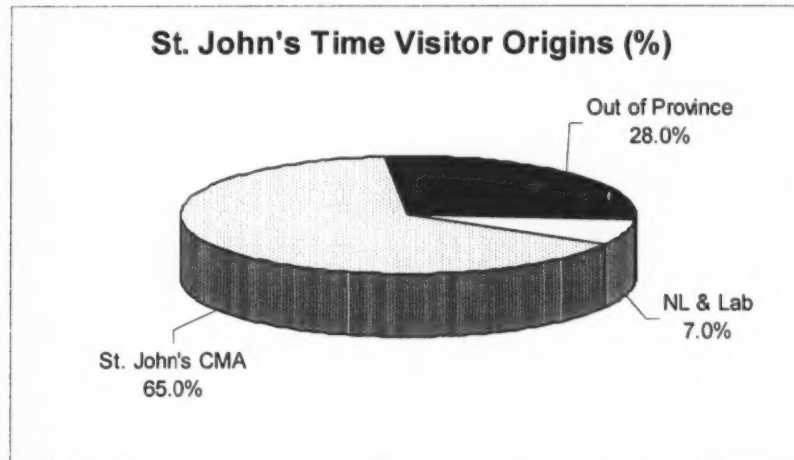


## 1.0

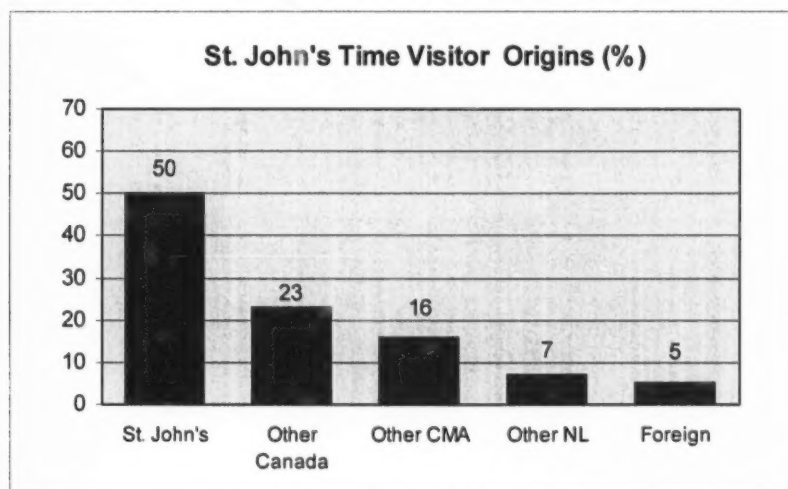
## Geographical Market

### 1.1 Geographical Market – Total Survey Respondents

The majority (65%) of St. John's Time patrons were from the St. John's Census Metropolitan Area (CMA) while 28% were visiting from outside the province and the remaining 7% were from other regions of Newfoundland and Labrador.

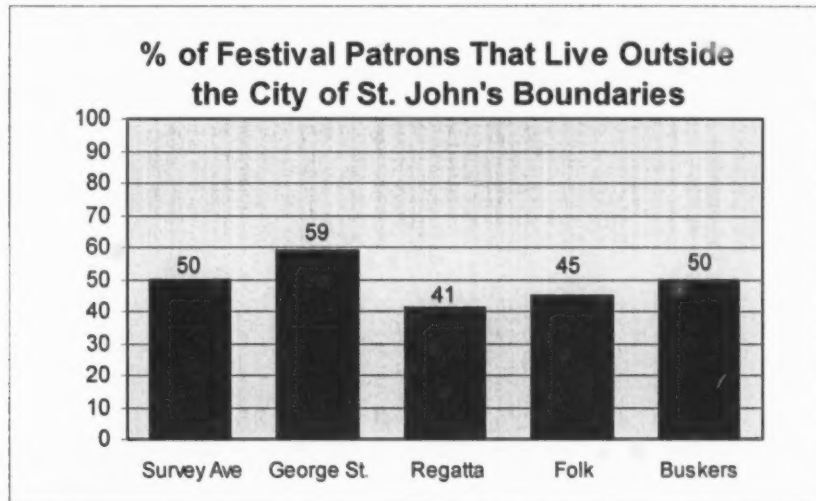


As seen in the following graph, a more detailed breakdown of the origin data revealed that one in two (50%) St. John's Time patrons resided outside the City of St. John's municipal boundary. Overall, 23% were from other Canadian provinces while 16% from the CMA communities surrounding the Capital City. Seven percent were from other towns and communities throughout the province and 5% were from outside Canada.





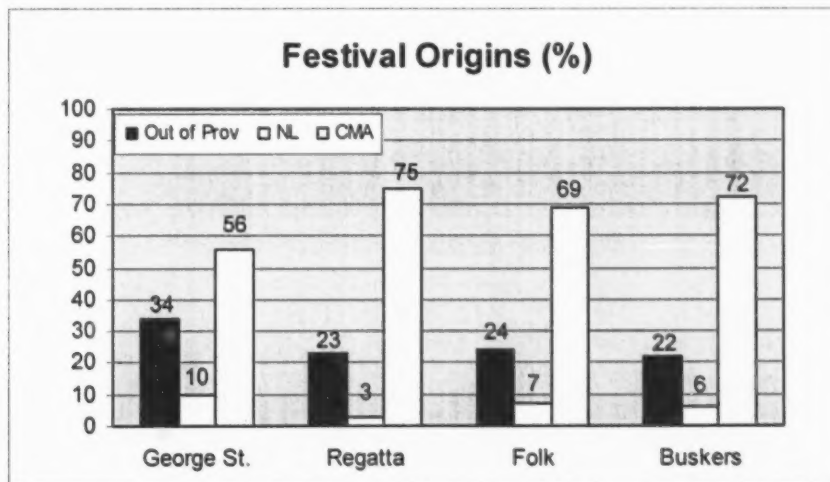
On a per festival basis, 59% of the George Street Festival patrons surveyed resided outside the City of St. John's municipal boundary compared to 50% of Busker Festival patrons, 45% of Folk Festival patrons and 41% of Regatta patrons.



## 1.2 Geographical Market by Festival

The origins of the George Street Festival patrons differed significantly from the other three St. John's Time festivals. As depicted in the following graph, the George Street Festival attracted the greatest share of out of province visitors (34%) and the lowest share of St. John's CMA residents (56%).

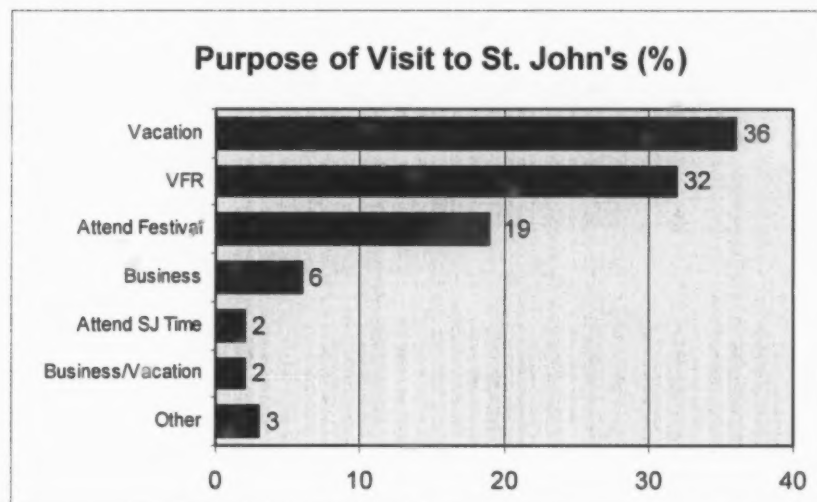
Meanwhile, approximately seven in ten patrons of the Royal St. John's Regatta (75%), Busker Festival (72%) and the Folk Festival (69%) were from the St. John's CMA.



## 2.0 Major Reason for Visiting St. John's

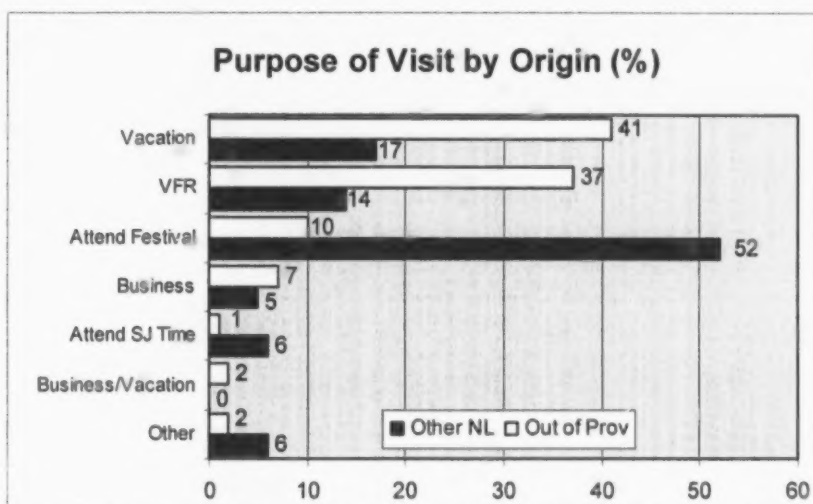
### 2.1 Purpose of Trip – Total Survey Respondents

Visitors who indicated they resided outside the St. John's (CMA) were asked "what was the major reason for visiting St. John's?". Overall, almost one in four (36%) indicated they visited St. John's for vacation purposes. Furthermore, one in three (32%) reported they visited St. John's to spend time with friends and relatives followed by 19% who visited St. John's to specifically attend the festival in which they were surveyed, six percent for business, two percent to specifically attend St. John's Time and two percent for a combined business and vacation trip. The remaining three percent visited for a number of other reasons including education, recreation or medical reasons.



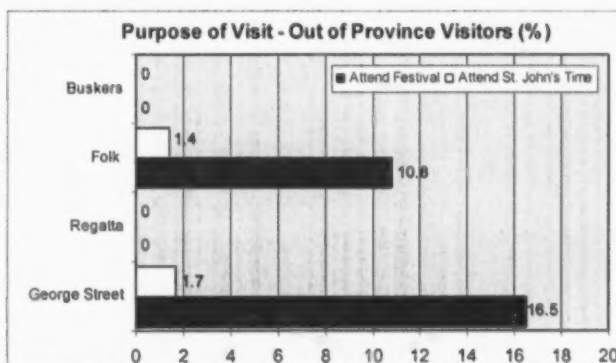
## 2.2 Purpose of Trip by Geographical Market

The St. John's Time festivals were a major draw in attracting visitors from other regions of Newfoundland and Labrador. Overall, six in ten (58%) St. John's Time Festival attendees from other regions of Newfoundland and Labrador indicated they visited St. John's to specifically attend the festival in which they were surveyed (52%) or to attend St. John's Time (6%). Meanwhile, out of province visitors were more likely to visit St. John's for vacation purposes (41%) and to visit friends and relatives (37%).



## 2.3 Purpose of Trip – Out of Province Visitors by Festival

Both the George Street Festival and Newfoundland and Labrador Folk Festival are travel generators for the City of St. John's. Overall 18.2% of out of province visitors surveyed reported the major reason for their visit to St. John's was to attend the George Street Festival (16.5%) or St. John's Time (1.7%). Meanwhile, 12.2% of out of province visitors reported the major reason for their visit was to attend the Folk Festival (10.8%) or St. John's Time (1.4%).



On the other hand, both the Royal St. John's Regatta and Busker Festival did not attract out of province visitors to St. John's. None of the parties surveyed at either the Regatta or Busker Festival indicated they visited St. John's to specifically attend either festival or St. John's Time.

**3.0****Length of Stay in St. John's**

The average length of stay in St. John's was 8.65 nights ranging from 1 to 100 nights. Out of province visitors had a much longer length of stay in St. John's (9.29 nights) than residents from other regions of Newfoundland and Labrador (5.26 nights).

As seen in the following table, the majority of visitors (62.9%) from other regions of Newfoundland and Labrador stayed between one and three nights in St. John's compared to only 17.5% of the out of province visitors. Meanwhile, almost one in four (37.9%) of out of province visitors stayed longer than a week compared to only one in ten (11.3%) visitors from other regions of the province.

**Length of Stay**

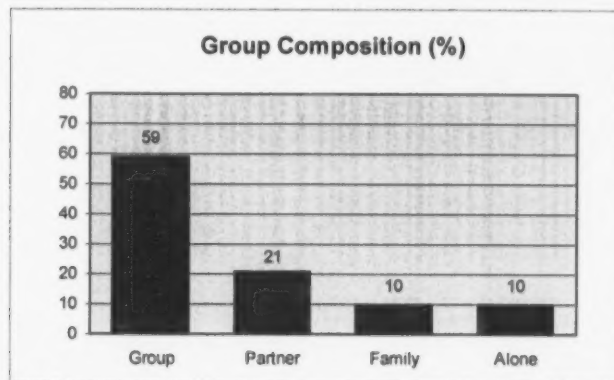
# Nights in City Total Survey Population	% of Parties	# Nights in City Out of Province Visitor	% of Parties	# Nights in City Other NL Residents	% of Parties
1-3	24.6%	1-3	17.5%	1-3	62.9%
4-7	41.6%	4-7	44.6%	4-7	25.8%
8-14	21.9%	8-14	24.7%	8-14	6.5%
15-30	9.4%	15-30	10.5%	15-30	3.2%
30+	2.5%	30+	2.7%	30+	1.6%
Avg Length Stay = 8.65 nights		Avg Length Stay = 9.29 nights		Avg Length Stay = 5.26 nights	

## 4.0

## Group Composition

### 4.1 Group Composition – Total Survey Respondents

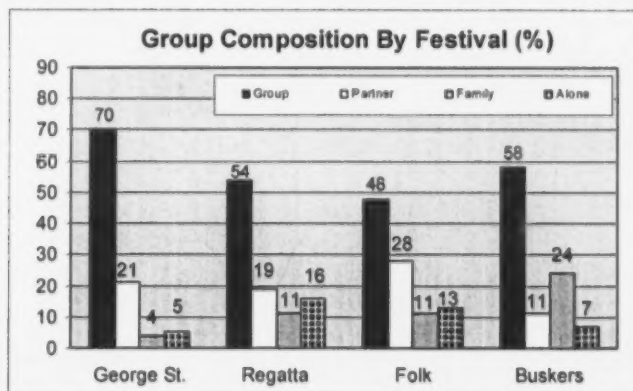
Six in ten (59%) St. John's Time patrons attended the festival with a group of family and/or friends followed by those attending with their partner/significant other (21%), family including parent(s) and children (10%) and alone (10%).



### 4.2 Group Composition by Festival

Although visiting with a group of family and friends was the leading type of group composition for all four festivals, there were some differences among the festivals. George Street festival patrons (70%) were more likely to attend their event with a group of family and/or friends than patrons to the other three festivals.

As seen in the graph below, the Busker Festival attracted more families (24%) than the Folk Festival (11%), Regatta (11%) and George Street Festival (4%). The Folk Festival attracted more patrons attending with a spouse or partner (28%) than the George Street Festival (21%), Regatta (19%) and Busker Festival (11%). The Regatta attracted more patrons attending alone (16%) than the Folk Festival (13%), Busker Festival (7%) and George Street Festival (5%).

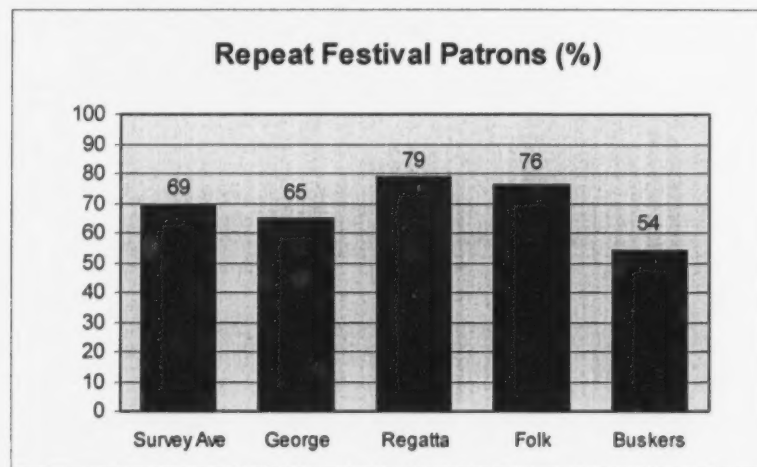


## 5.0

### Repeat Visitors

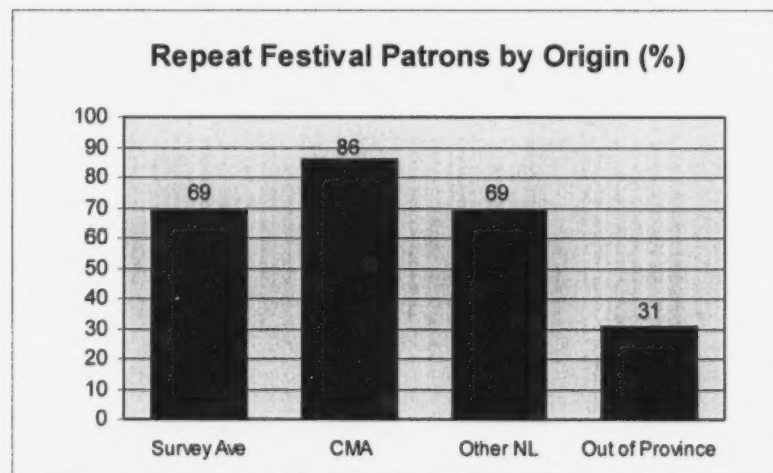
#### 5.1 Repeat Visitors by Festival

Seven in ten (69%) festival patrons surveyed were repeat festival attendees. The Royal St. John's Regatta had the highest percentage of repeat visitors. Overall, eight in ten (79%) patrons surveyed at the Regatta reported they had attended the event previously. Meanwhile, 76% had attended the Folk Festival in the past while 65% had attended the George Street Festival and 54% attended the Busker Festival.



#### 5.2 Repeat Visitors by Origin

St. John's CMA residents (86%) were more likely to have previously attended the St. John's Time event at which they completed a survey than residents from other parts of Newfoundland and Labrador (69%) and out of province visitors (31%).

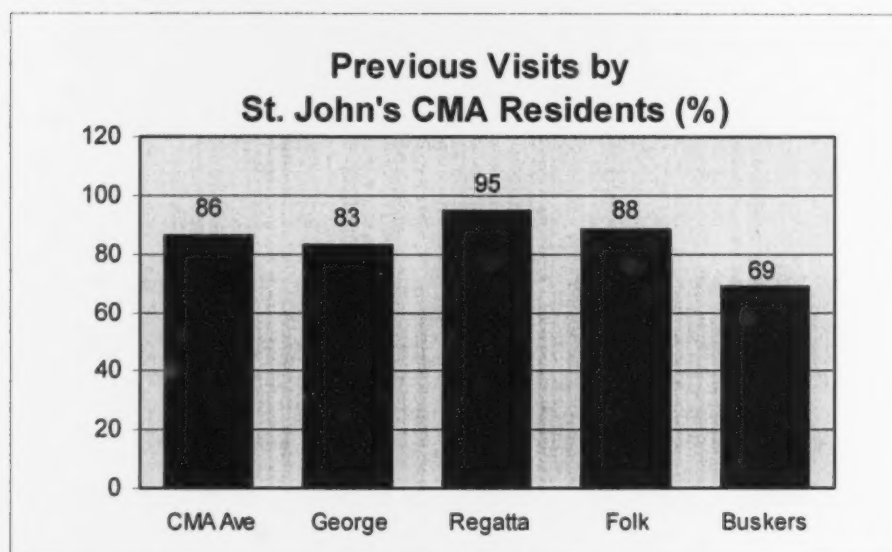




### 5.3 Repeat Visitors - St. John's CMA Patrons

As seen in the following graph, there was a significant difference in the repeat attendance levels by local residents attending the four St. John's Time events. Nineteen out of twenty (95%) St. John's CMA residents surveyed at the Royal St. John's Regatta reported they attended in a previous year. Meanwhile, 88%, 83% and 69% of Folk, George Street, and Busker Festival patrons respectively, reported they attended these festivals previously.

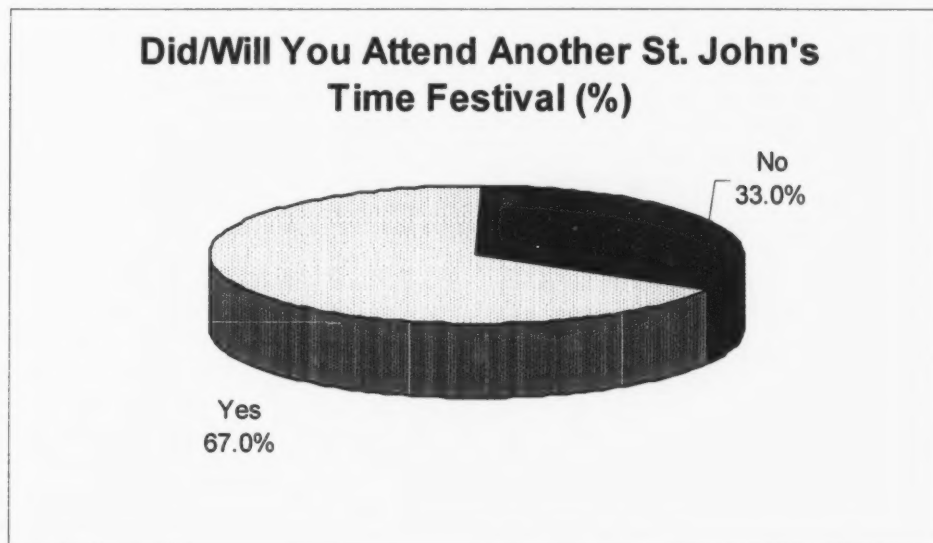
On the other hand, the Busker Festival (31%) attracted a greater share of first time or new customers than did the George Street Festival (17%), the Folk Festival (12%) and the Royal St. John's Regatta (5%).





## 6.0 Attendance Levels at the Other St. John's Time Festivals

Two out of three (67%) patrons surveyed indicated they had attended or planned to attend at least one of the other three St. John's Time festivals included in the study while the remaining 33% reported they would only attend the event at which they were surveyed.



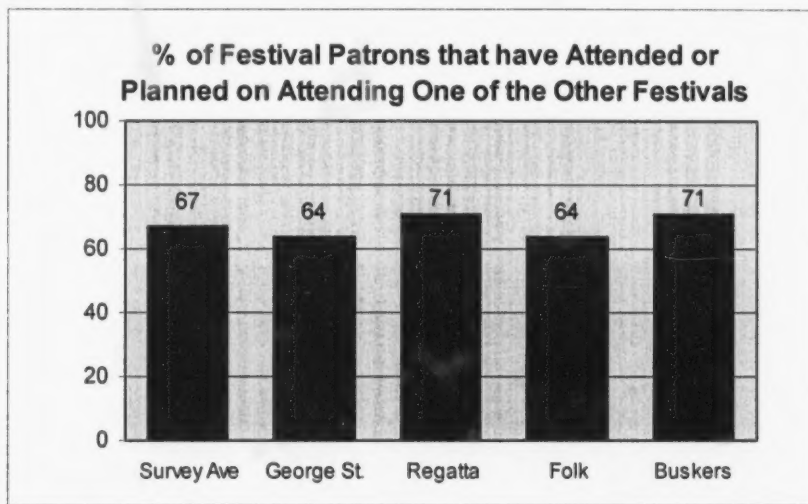
The average number of St. John's time festivals attended was 2.05. One in ten (10%) attended all four festivals while two in ten (19%) attended three festivals and four in ten (38%) attended two festivals.

### Number of Festivals Attended (N=4)

# of Festivals Attended	% of Parties
1	33%
2	38%
3	19%
4	10%

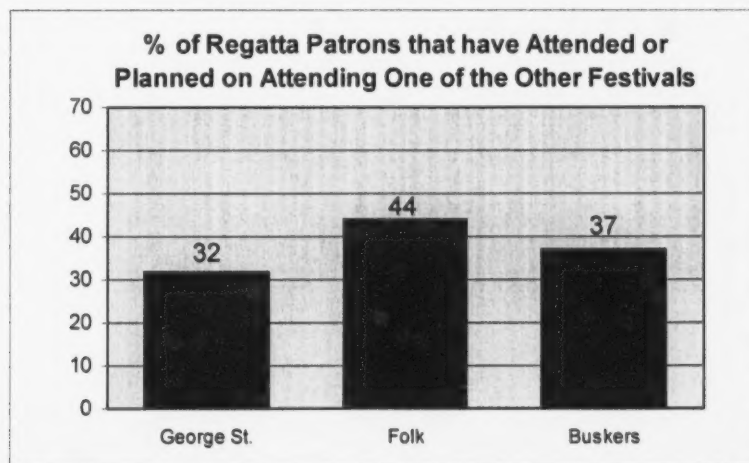
Patrons attending both the Royal St. John's Regatta and Busker Festival were more likely to attend one of the other festivals.

Overall, 71% of both the Royal St. John's Regatta patrons and the Busker Festival patrons reported they had attended or planned to attend one of the other three festivals. Meanwhile 64% of both Folk Festival patrons and George Street Festival patrons reported they had attended or planned to attend another festival.



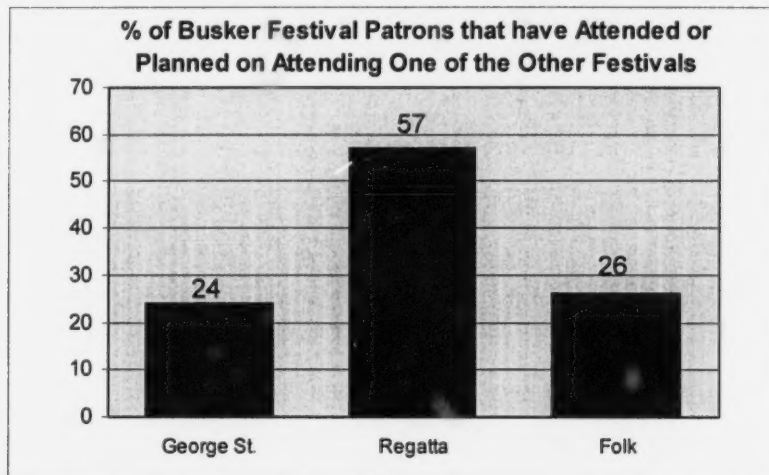
### 6.1 Royal St. John's Regatta

As seen, 71% of Royal St. John's Regatta patrons have attended or planned on attending one of the other three St. John's Time festivals. More than four in ten Regatta patrons planned on attending the Folk Festival (44%) while 32% reported they attended the George Street Festival and 37% reported they planned on attending the Busker Festival.



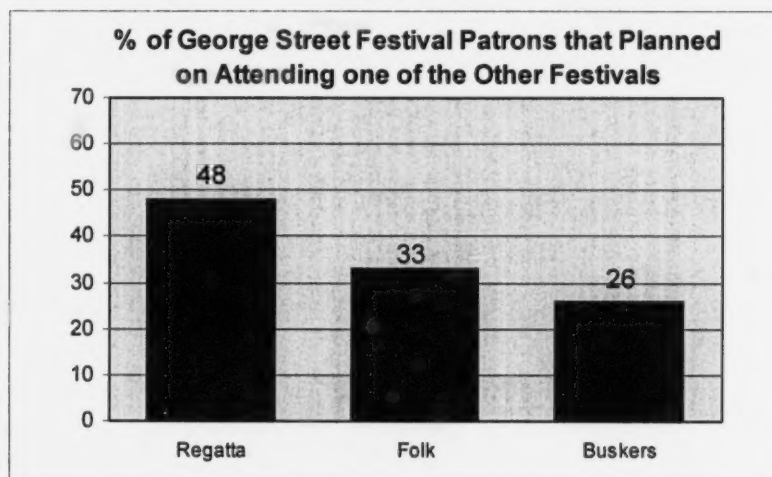
## 6.2 Busker Festival

As seen, 71% of Busker Festival patrons have attended or planned on attending one of the other three St. John's Time festivals. Six in ten (57%) Busker Festival patrons reported they attended the Royal St. John's Regatta while 26% reported they planned on attending the Folk Festival and 24% indicated they attended the George Street Festival.



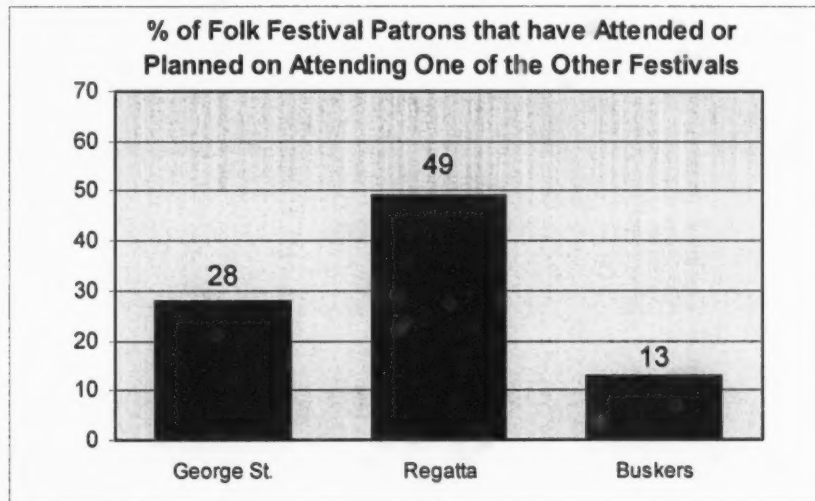
## 6.3 George Street Festival

As seen, 64% of George Street Festival patrons indicated they would attend one of the other three St. John's Time events. Overall, 48% reported they planned on attending the Royal St. John's Regatta while 33% intended to attend the St. John's Folk Festival followed by 26% who reported they would attend the Busker Festival.



#### 6.4 Newfoundland and Labrador Folk Festival

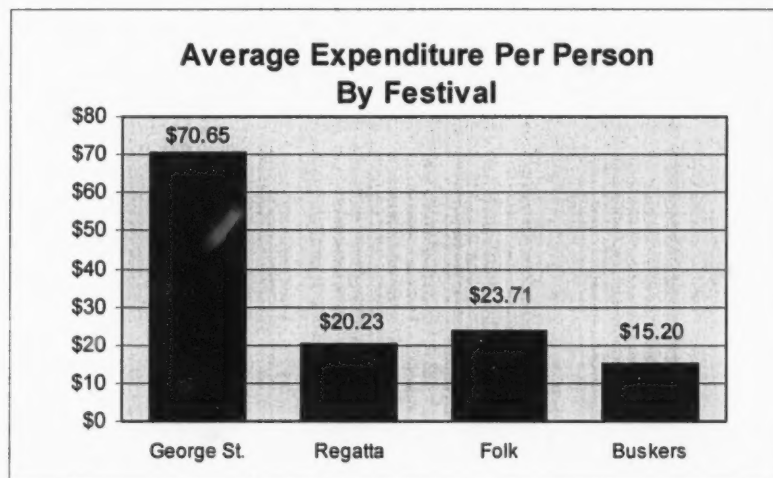
As seen, 64% of Newfoundland and Labrador Folk Festival patrons have attended or planned on attending one of the other three St. John's Time festivals. One in two reported they attended the Royal St. John's Regatta (49%) while three in ten reported they attended the George Street festival (29%) and one in ten indicated they have attended or planned on attending the Busker Festival (13%).



**7.0****Expenditures**

The survey found that there was a significant difference in the average expenditure per patron<sup>1</sup> among the four St. John's Time festivals. George Street Festival patrons spent the most while Busker Festival patrons spent the least.

George Street Festival patrons spent an average of \$70.65 per person, significantly higher than the amount spent by the patrons surveyed at the other three festivals. Folk Festival patrons spent an average of \$23.71 followed by the Royal St. John's Regatta patrons (\$20.23) and Busker Festival patrons (\$15.20).

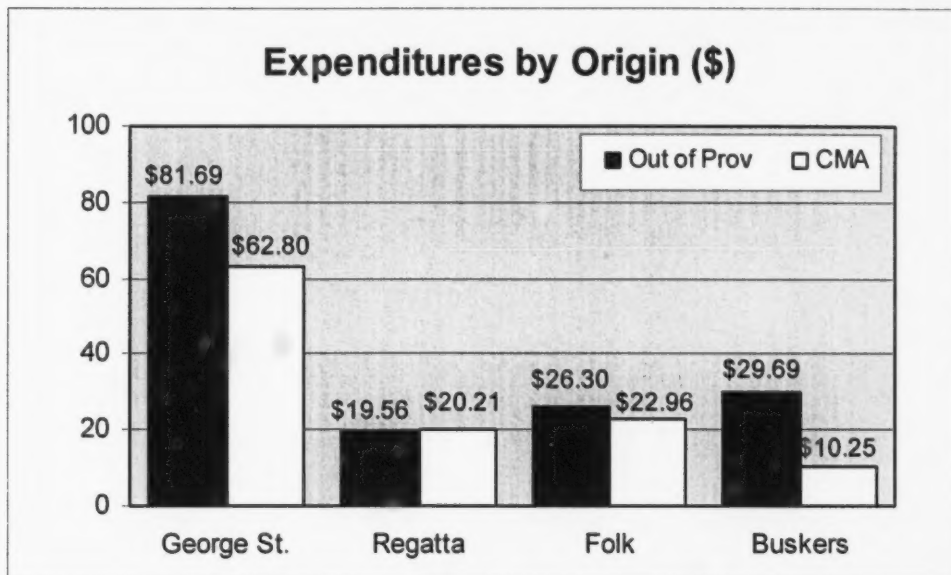


As seen from the graph on the following page, out of province visitors spent more than St. John's area residents at three of the four festivals. Out of province visitors to the George Street Festival spent \$18.89 or 30.1% more per person than did the residents from the St. John's region. Overall, out of province visitors spent \$81.69 at the George Street Festival while residents from the St. John's CMA spent \$62.80.

Out of province visitors spent \$26.30 at the Folk Festival, \$3.34 or 14.5% more than the amount spent by St. John's CMA residents (\$22.96). Meanwhile, out of province visitors spent \$29.69 downtown during the Busker Festival, \$19.44 or 190% more than the amount spent downtown by St. John's CMA residents (\$10.25).

As for the Regatta, there was very little difference in amount spent by both out of province visitors and local residents. Overall, out of province visitors spent \$20.21 compared to \$19.56 by CMA residents.

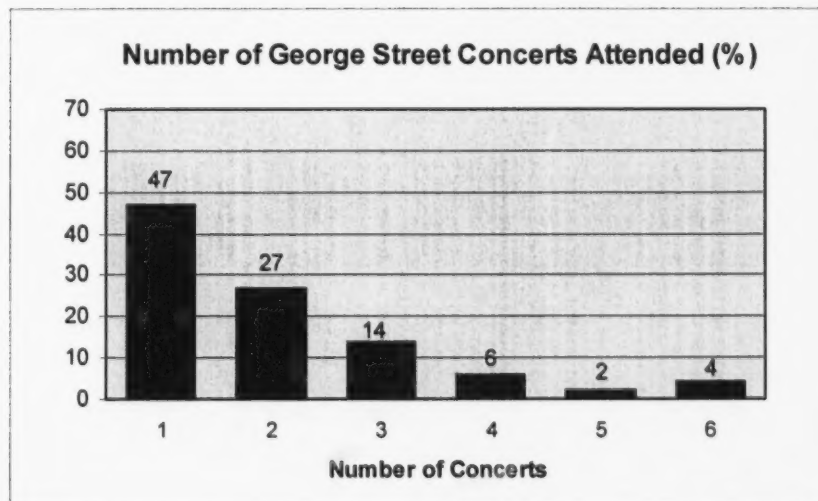
<sup>1</sup> The George Street and Folk Festival expenditures **do not** include the price of admission **but do** include transportation cost (taxi) to and from the event. The George Street Festival expenditure also includes the amount spent on dining and beverages at George Street properties prior to the first musical act. Folk Festival expenditures also include the amount spent on goods purchased at the various kiosks selling a variety of goods at the festival. Busker Festival expenditures include the amount spent downtown by the festival patrons before, during and after participating in the event.



## 8.0

### Number of George Street Concerts Attended

The average number of concerts that George Street Festival patrons attended over the six-night festival was 2.02. The number of concerts or nights attended ranged from 47% of patrons that attended one of the six concerts to four percent of patrons that attended all six concerts. Overall, two in four (26%) attended three or more of the six concerts.





## 9.0 Length of Time Spent at Royal St. John's Regatta

The average length of time spent at the Royal St. John's Regatta was two hours and 53 minutes, ranging from one individual that attended for 30 minutes to an individual that attended for 10 hours or 600 minutes. Overall, one in two (56%) spent three or more hours at the regatta.

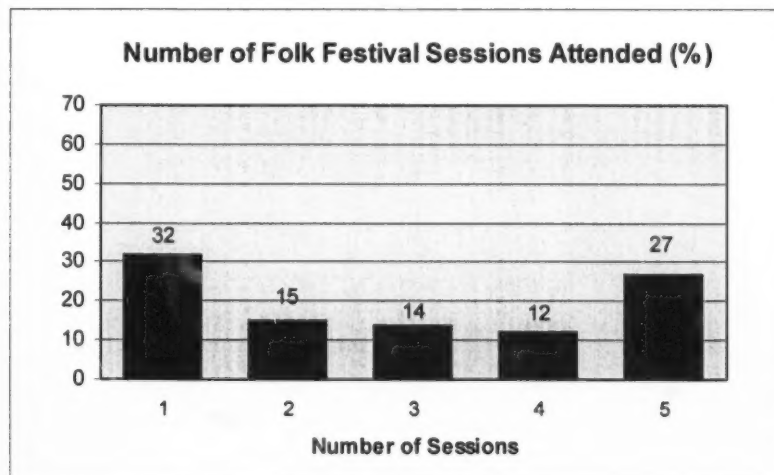
### % of Parties by Number of Hours Spent at the Regatta

# Hours Spent At Regatta	% of Parties
<1	1.6%
1	9.1%
2	33.0%
3	29.8%
4	16.8%
5	3.6%
6	2.3%
7+	3.9%

**Note:** The number of hours reported in the above table have been rounded to the nearest hour. For example, parties reporting they spent 2.5 hours at the regatta have been rounded to three hours.

## 10.0 Number of Folk Festival Sessions Attended

The average number of sessions that Folk Festival patrons attended over the three-day festival was 2.87 (out of a possible 5). The number of sessions attended ranged from 32% of patrons that attended one session to 27% that attended all five sessions. Two in three (68%) attended more than one session while one in two (53%) attended three or more sessions.





### 11.0 Number of Busker Performances Attended

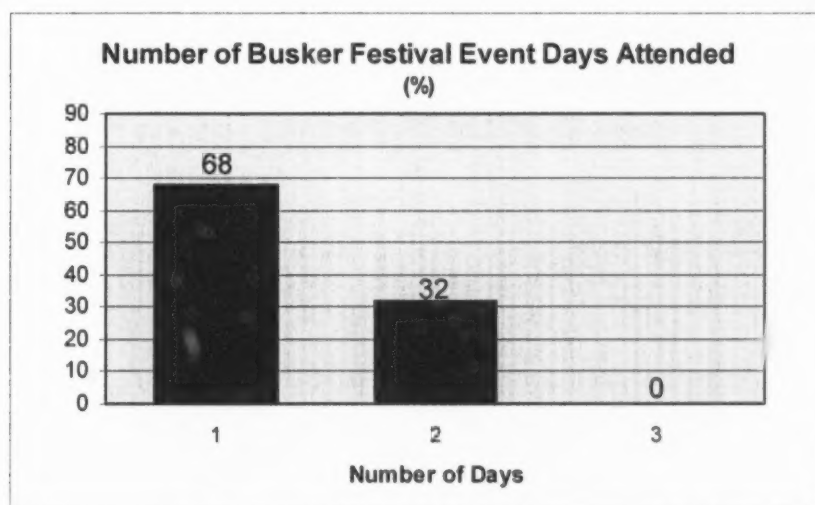
The average number of performances that Busker Festival patrons attended per day was 2.89. The number of performances attended ranged from 12% of patrons that attended one performance to 7% that attended five performances. Six in ten (63%) attended three or more busker performances per day.

#### % of Parties by the Number of Busker Performances Attended

# Performances Attended	% of Parties
1	12%
2	25%
3	43%
4	13%
5	7%

### 12.0 Number of Busker Festival Days Attended

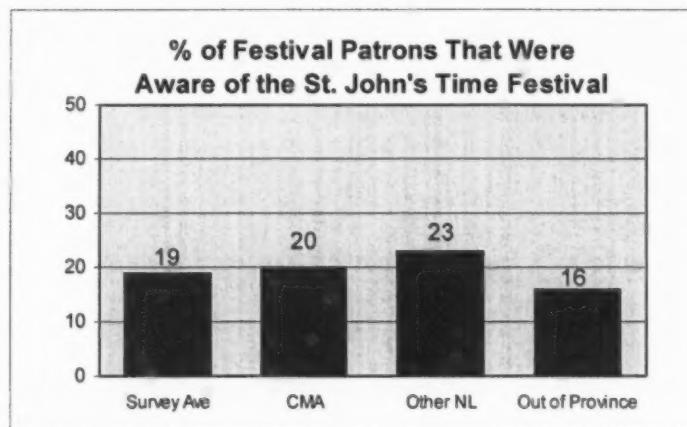
The average number of days that Busker Festival patrons attended over the three-day festival was 1.32. Overall, two in three (68%) patrons surveyed attended the festival once during the three day period while the remaining 32% attended two days. None of the survey respondents reporting visiting all three festival event days.



### 13.0 Awareness Level of St. John's Time Festival

#### 13.1 Awareness Level by Origin

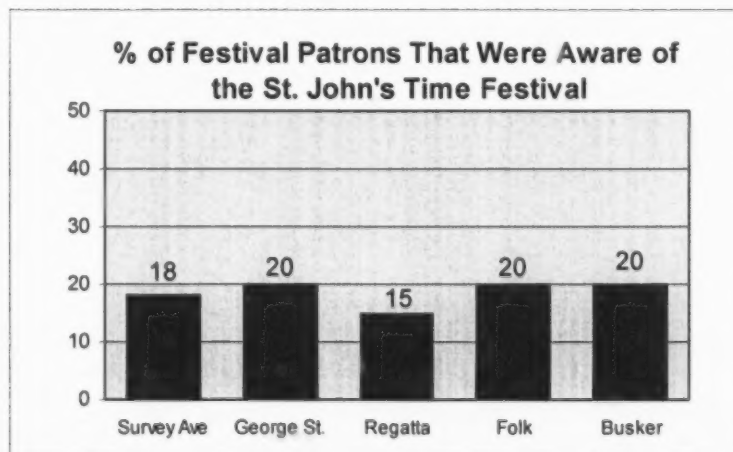
Approximately one in five patrons surveyed (19%) indicated that they heard of the St. John's Time Festival. Residents from other regions of Newfoundland and Labrador reported a slightly higher awareness level (23%) than both residents from St. John's CMA (20%) and visitors from out of province (16%).



#### 13.2 Awareness Level by Festival

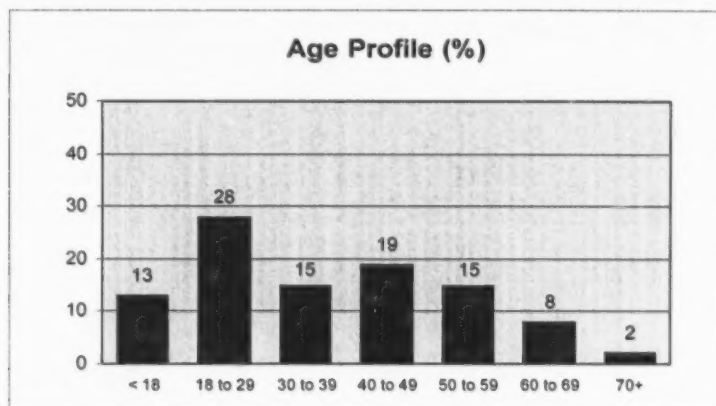
As seen in the graph below, there were little differences among three of the four festivals with regard to the awareness level for the St. John's Time Festival.

Overall, patrons attending the Royal St. John's Regatta had a lower awareness level of the St. John's Time Festival (15%) than those attending the other three festivals. Meanwhile, one in five (20%) attendees to the Royal St. John's Regatta, Folk Festival and Busker Festival were aware of the St. John's Time Festival.



## 14.0 Age of St. John's Time Festival Patrons

Six in ten St. John's Time patrons (59%) reported their age as 30 years or older while the remaining 41% were less than 30 years of age. Overall, almost three in ten (28%) festival patrons surveyed were between 18 and 29 years of age.



As depicted in the following graphs, age profiles differ among the four St. John's Time festivals. The Royal St. John's Regatta and Busker Festival attracted a younger clientele than both the Folk and George Street Festivals.

More than one in three Busker Festival patrons (36%) and two in ten Royal St. John's Regatta patrons (22%) were less than 18 years of age compared to 11% of Folk Festival patrons and 0% of the George Street Festival patrons.

Meanwhile, the Folk Festival received a greater share of the 50 years of age or older patrons. Overall, 40% of Folk Festival patrons were 50 years of age or older compared to the Royal St. John's Regatta (27%), George Street Festival (20%) and the Busker Festival (15%).

